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L A T E C A B L E S . . .

Estimates for 1938 crop production have been reported as follows, with 1937 comparisons in parentheses: Greece, wheat 34,097,000 bushels (32,375,000), rye 2,559,000 (2,579,000), barley 13,044,000 (10,341,000), oats 12,814,000 (9,755,000); Belgium, winter wheat 15,447,000 (17,784,000), rye 15,432,000 (13,583,000), barley 3,674,000 (3,929,000), oats 37,409,000 (35,839,000); Sweden, winter wheat 25,353,000 (21,259,000), winter rye 15,353,000 (15,718,000); Latvia, wheat 7,643,000 (6,301,000), barley 10,885,000 (10,031,000), oats 32,725,000 (27,903,000), flaxseed 827,000 (880,000), flax fiber 48,501,000 pounds (50,971,000); Lithuania, wheat 9,076,000 bushels (8,109,000), rye 24,644,000 (23,894,000), barley 12,355,000 (12,584,000), oats 29,280,000 (26,715,000); Lithuania area, flax 192,000 acres (218,000), potatoes 460,000 (456,000). (International Institute of Agriculture, Rome.)

Germany including Austria crop area and production for 1938 estimated as follows with 1937 comparisons in parentheses: Wheat 5,641,000 acres (5,520,000), 214,728,000 bushels (178,590,000); rye 11,421,000 acres (11,160,000), 356,437,000 bushels (289,126,000); barley 4,117,000 acres (4,631,000), 205,855,000 bushels (178,555,000); oats 7,403,000 acres (7,728,000), 462,208,000 bushels (436,339,000). (International Institute of Agriculture, Rome.)

Argentina areas sown for 1938-39 crops estimated as follows with 1937-38 acreage in parentheses: Wheat 20,015,000 acres (19,219,000), rye 2,100,000 (2,184,000), barley 2,026,000 (1,942,000), oats 3,361,000 (3,254,000), flaxseed 6,869,000 acres (7,023,000). (Buenos Aires office, Bureau of Agricultural Economics.)

Scotland crop production in 1938 estimated as follows with 1937 comparisons in parentheses: Wheat 3,957,000 bushels (4,181,000), barley 4,200,000 (3,867,000), oats 46,200,000 (46,620,000), potatoes 36,213,000 (34,421,000). (London office, Bureau of Agricultural Economics.)

British Board of Trade announces total bacon import quota for period October 1 - December 31, 1938, at 1,328,305 cwt. (148,771,000 pounds), with United States share 12,050,000 pounds. Comparable 1937 figures are 1,306,192 cwt. (146,294,000 pounds) and 11,850,000 pounds. (London office, Bureau of Agricultural Economics.)

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Serious drought in the Soviet Union confirmed

The heat wave and drought of 1938 affected severely all spring grain and to a lesser extent winter grain in a large area of the Soviet Union, according to a telegraphic report of L. G. Michael, agricultural attaché at Belgrade, who recently visited various agricultural regions of the Soviet Union. The area of poor crops extends from the Volga east as far as Omsk in Siberia and southwest nearly to the Black Sea, then northwest through a large section of the Ukraine to the frontier of Poland. Farther east in Siberia, rank growth, excessive rain, lodging, and harvesting difficulties are reported.

The quality of rye and wheat is poor generally. The Government leaves the poorest quality on farms and takes the best. In many localities the supply on farms will be short. It is probable that the Government's carry-over and procurements will be sufficient to supply the urban and other non-rural demand better than in 1936 when a severe drought was also experienced. The situation with respect to the urban supply of such vegetables as cabbage and potatoes may be as bad as in 1936-37.

The feed-grain situation is worse than in 1936 even though there is probably considerable carry-over from 1937. Because of drying up of pastures this summer, the hay situation is not good, although there are considerable stocks on farms and held by the Government. In the drought area a decrease in livestock numbers is likely, although it probably will not reach the panicky stage of 2 years ago. With too little or no rain, the fall seeding is proceeding slowly in the regions affected by the drought. Fall plowing for spring crops has been delayed.

The Oriental wheat situation

The combined 1938 wheat crop of China, Manchuria, and Japan is now estimated by the Shanghai office of the Bureau of Agricultural Economics at 696 million bushels, about 5 percent less than the small 1937 crop and 23 percent below average. The reduction in the wheat acreage of China was an important factor in the decline in oriental wheat production this year, but unfavorable weather conditions in North China, Manchuria, and Japan during the growing period made prospects even less promising as the season advanced.

With wheat stocks carried over from 1937-38 much smaller than those of the previous season, total supplies in the Orient are considerably below average. Imports of foreign wheat during the marketing year 1938-39, however, are expected, to continue at a comparatively low level as a result of the various government restrictions in the three areas, reduced purchasing power in China, and foreign-exchange difficulties. The total imports, including flour, are estimated at approximately 9 million bushels, as compared with a little more than 7 million bushels imported in 1937-38 and 57 million bushels as the 5-year average, 1931-32 to 1935-36. The outstanding development of the past season was the large flour movement from Japan into North China. It is

probable that Japan will continue to ship a considerable quantity of flour to this market during the new year although perhaps in somewhat reduced volume.

China

Wheat production in China this year has not fulfilled earlier expectations, and the 1938 crop is now estimated by the Shanghai office at only 616 million bushels as compared with 640 million bushels harvested in 1937 and the average for 1931-1935 of 780 million bushels. The carry-over of wheat and flour in most sections of the country is smaller than a year ago. The total imports during the 1938-39 crop year (July to June), despite the decreased supply, are expected to be about the same as for the preceding season.

Wheat imports into China during 1937-38 were practically nil and were the smallest for any year since 1920. During the 5 years 1931-32 to 1935-36 imports averaged over 26 million bushels. Flour imports during 1937-38 increased considerably over the previous year, amounting to approximately 2,762,000 barrels. The large increase was primarily the result of disrupted transportation facilities and the closing of many Chinese mills. All principal flour-exporting countries shared in the increase except Canada, while Japanese flour mills for the first time in many years furnished by far the largest percentage.

CHINA: Flour imports by sources, 5-year average 1931-32 to 1935-36, and 1936-37 and 1937-38

Crop-year July-June	United States	Canada	Australia	Japan	Others	Total
	1,000	1,000	1,000	1,000	1,000	1,000
Average 1931-32 to 1935-36...	barrels 920	barrels 102	barrels 393	barrels 437	barrels 41	barrels 1,893
1936-37.....	35	120	115	9	2	281
1937-38.....	166	79	509	921	37	a/1,712

Chinese Maritime Monthly Foreign Trade Returns.

a/ Estimated an additional 1,050,337 barrels entered during the year, largely from Japan and some from Manchuria, without being recorded in the official customs returns.

The marketing of the new crop has begun, and Shanghai mills have been able to secure current requirements, but North China supplies have been curtailed by military activities. Flour production increased at the beginning of the new season but is still much below the usual level. Imports from Japan have fallen off in recent weeks, and some overseas flour has moved in despite the unfavorable exchange situation.

Manchuria

Despite an increase in the average seeded to wheat in Manchuria, the 1938 crop is now estimated to be about 16 percent smaller than that of last season, when about 40 million bushels were harvested. The carry-over from

1937-38 was the smallest of recent years, and the Government has taken steps to control the exportation of certain food crops in order to conserve domestic supplies. Imports of flour from Japan are expected to increase during 1938-39 unless Japanese wheat supplies are reduced too drastically, in which case foreign flour may be brought in despite government restrictions. Present indications are for a tightening of government control, and measures for the use of flour substitutes and admixtures appear likely.

Japan

Unusually small yields in some of the important wheat districts of Japan have made it necessary to reduce earlier estimates of the 1938 wheat crop, which is now expected to approximate 45 million bushels, as compared with more than 50 million bushels produced last year. Furthermore, the quality of the crop is reported to be much below average as a result of rainy weather in the harvesting season. The carry-over of wheat from 1937-38 was small so that the total supply at the beginning of this marketing year was substantially less than that available last year. Prices of both wheat and flour increased early in 1938-39 and were about 15 percent higher than those of the corresponding period of 1937-38. Purchases of foreign wheat so far this season have been negligible, but with a short crop at home and in Manchuria, an increase in total wheat imports for 1938-39, as compared with last season, appears probable, even though the Government continues its efforts to conserve foreign exchange.

JAPAN: Wheat, including flour, supply and
disappearance, 1928-29 to 1937-38

Year	Production	Imports		Total supply	Wheat flour exports	Utilization (ignoring changes in stocks)
		Wheat	Flour			
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
1928-29	32,220	27,983	219	50,422	10,767	49,655
1929-30	31,890	18,324	831	51,045	5,403	45,642
1930-31	30,887	24,813	529	56,229	7,953	48,276
1931-32	32,304	29,712	264	62,280	7,592	54,688
1932-33	32,768	18,802	29	51,599	15,092	36,507
1933-34	40,410	16,504	60	56,974	12,795	44,179
1934-35	47,660	17,924	59	65,643	16,418	49,225
1935-36	48,718	14,503	519	63,740	10,131	53,609
1936-37	45,192	7,789	1,099	54,080	4,432	49,648
1937-38	50,410	4,620	77	55,107	14,275	40,832

Compiled from official sources. Flour converted to wheat on basis of 1 barrel equals 4.5 bushels.

Chihuahua, Mexico, sends more cattle to the United States

Figures compiled by the Regional Union of Livestock Growers, at Chihuahua City, Mexico, indicate that 58,200 head of cattle were exported from the State of Chihuahua to the United States during 1937, according to a recent report from American Vice Consul James C. Powell, Jr., at Chihuahua. United States records place total imports from Mexico for the same period at 198,768 head.

Favorable price levels in the United States during the past 3 years for beef cattle of the grades chiefly received from Mexico have resulted in a noticeable increase in exports of cattle from Chihuahua and other frontier States of Mexico. This outlet for Mexican cattle has tended to improve conditions obtaining in the local livestock industry, the consul states. The lower United States duties on cattle weighing 700 pounds or more resulting from the United States trade agreement with Canada also have been a factor. The 1938 imports of cattle into the United States from Mexico have so far exceeded those of 1937.

CATTLE: Imports into the United States from Chihuahua and total imports from Mexico, 1933-1937

Year	Imports from Chihuahua a/			Total imports c/
	Quantity	Value	Unit value b/	
	Number	Dollars	Dollars	Number
1933	9,543	98,270	10.28	62,325
1934	6,859	68,650	10.00	55,853
1935	58,743	675,242	11.49	251,090
1936	45,187	560,560	12.40	164,046
1937	58,200	-	-	198,768

a/ Statistics obtained from collector of customs, El Paso, Texas, for 1933-1936; figures furnished by Regional Union of Livestock Growers, Chihuahua, for 1937.

b/ Estimated.

c/ Records of the Bureau of Foreign and Domestic Commerce.

Federal export tax

The consensus of opinion among local cattlemen is that the Federal tax of 12 percent ad valorem on exports, which became effective on August 9, 1938, will adversely affect the local livestock industry, according to the consul. Normally about one-third of the marketable beef cattle in the State of Chihuahua are annually exported and placed on the market in the United States. The peso returns on the sale of these cattle represent a gain of some 39 percent because of the drop in the exchange value of the peso from 28 United States cents (prior to March 1938) to 20 cents. Cattle

raisers state, however, that this gain is offset largely by the increase in the cost of production, since their purchases of imported items constitute some 50 percent of operating expenses.

Cattlemen also fear that, unless efforts now being made before the Federal Commission of Appraisals (Comisión de Aforo) at Mexico City to obtain an adjustment in the application of the new law respecting cattle exports are successful, there will be a larger number than usual of beef cattle placed on the domestic market. This will naturally bring about a decline in the local price of livestock.

New State tax on cattle

The situation of livestock growers in this State is further aggravated by a recent amendment to the State tax law, effective September 1, 1938, providing for a fee on each animal sold or slaughtered in, removed from, or introduced into, the State. This law - purely a measure for raising additional revenue - imposes, among other things, the following taxes on cattle, which are also subject to the usual Federal surtax of 15 percent:

	<u>Pesos</u>	<u>Cents</u>
(1) For each head sold or removed from the State.....	2.00	40
(2) For each head slaughtered.....	1.50	30
(3) For each head introduced temporarily into the State for a period not to exceed 1 year.....	0.50	10
(4) For each head introduced temporarily into the State for a period exceeding 1 year.....	1.00	20

For the purpose of this law, the removal of livestock from the State will be considered as a sale.

Other legislation affecting the industry

Of prime consideration to livestock producers is the local application of the amendment to the Mexican agrarian law, which became effective March 6, 1937, whereby lands devoted to grazing purposes might be exempted for a period of 25 years, under certain conditions, from expropriation under the law. The consul reports that, according to the records of the Mixed Agrarian Commission at Chihuahua, only nine property owners in this State have thus far filed petitions for certificates of exemption. These petitions are being held at Chihuahua pending investigation into the facts in each case by the local commission before being forwarded to the Agrarian Department at Mexico City for final decision.

Although this amendment to the agrarian law was designed to encourage the development and expansion of the cattle industry, it has not

operated to accomplish this purpose, the consul states. He reports further that, according to local cattle raisers, the preparation of the petitions and of the documentary evidence required under the regulations to establish that the property in question meets with the specifications of the law calls for the services of technical men and therefore only large operators can afford to file petitions. Moreover, the stipulation that the owner of the land and of the livestock must be the same person has operated further to limit the number of stockmen who can qualify, since a large number of growers in this State lease their grazing lands.

Regional associations of livestock growers

The Chihuahua State Department of Agriculture, carrying out the recommendations for cooperation among livestock growers, adopted during the First Regional Congress of Agriculturists, February 26-28, 1938, recently announced through the local press that 45 regional associations of livestock growers and farmers had been formed. These organizations are for the purpose of promoting the interests of these groups and assisting them in their attempts to obtain through concerted effort favorable consideration of their problems by the State authorities.

Stockmen at the meeting of the Congress adopted resolutions seeking the aid of the Chihuahua State government in (1) the establishment of a State experimental breeding farm; (2) the improvement in methods and requirements for registration of blooded stock; (3) the removal of duties on animals of both sexes imported into the country for breeding purposes; (4) the enactment of legislation requiring owners to vaccinate their livestock against infectious and contagious diseases; (5) the maintenance of an adequate number of veterinarians throughout the State; (6) the rigid and effective enforcement of the State law designed to prevent theft of livestock, including adequate supervision over the slaughtering of animals and the sale of hides; and (7) the removal of Federal duties on windmills and barbed wire imported into the country from abroad for ranch purposes.

Danish hog numbers reduced

The Danish hog census for August 1938 indicates a reduction of 9 percent in total numbers from the comparable 1937 figures, according to the August 27 census returns cabled from the Berlin office of the Bureau of Agricultural Economics. Smaller numbers were general, only sows in farrow showing a slight increase over the number recorded a year earlier.

Hog numbers, however, show some increase from the exceedingly low point reached in February 1938, when the total stood at 2,570,000 head, the lowest figure on record since 1925. Early in 1938 an attempt was made to overcome the anticipated shortage in slaughter supplies

during the summer by purchases of feeder pigs from neighboring countries. Feeder-pig prices, however, were of record height and the hog-feed ratio became increasingly unfavorable during the early months of the year. Some difficulty was experienced in filling the British bacon quota during the summer months, though prices for Danish bacon on the British market were maintained at high levels.

DENMARK: Hog numbers, August census, 1935-1938

Classification	August 24, 1935	August 29, 1936	August 28, 1937	August 27, 1938
	Thousands	Thousands	Thousands	Thousands
Sows:				
Farrowing.....	259	255	197	200
Others.....	124	183	134	115
Total sows.....	383	438	331	315
Slaughter pigs:				
Suckling.....	782	1,006	794	678
Under 35 kilograms.....	742	947	811	726
Over 35 kilograms.....	1,238	1,304	1,211	1,155
Total slaughter pigs.....	2,762	3,257	2,816	2,559
Boars.....	21	23	20	16
Total swine.....	3,166	3,718	3,167	2,890

London and Australian wool sales

Prices at the London wool sales opened September 20 showed a slight tendency to weaken, according to cabled advises from Assistant Agricultural Attaché P. G. Minneman. Best greasy merinos, however, remained firm, as did several other descriptions, including medium low crossbreds and slipes. Germany was an active buyer of merinos. Switzerland also took a few lots, but France was quiet. Yorkshire buying was largely in crossbreds. There was no buying for American account. In Australia, buying at Sydney on September 19 maintained the values set at Brisbane on September 15. The Sydney sales brought out good competition, with continental countries and Yorkshire the chief buyers. Japanese buying also was more active than at the earlier sale.

Australian wool values have been firm since the 1938-39 selling season opened August 29 at Sydney. According to Consul E. E. Evans at Bradford, early prices were regarded as encouraging to the British wool trade, and in line with expectations. The market was firm for best wools at closing rates of the 1937-38 season in June, but inferior sorts were irregular. Continental countries were relatively more active than Yorkshire buyers. The early wools on offer were chiefly suited to continental usage, although Yorkshire importers were prominent bidders where the wools offered were suitable. Japan was only moderately active.

COTTON: Price per pound of representative raw cotton at Liverpool,
September 16, 1938, with comparisons

Growth	1938							
	July		August				Sept.	
	29	5	12	19	26	2	9	16
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
American -								
Middling.....	10.21	9.97	9.70	9.71	9.54	9.81	9.46	9.62
Low Middling.....	8.68	8.64	8.38	8.39	8.23	8.49	8.15	8.32
Egyptian (Fully Good Fair) -								
Sakellaridis.....	16.19	16.04	15.65	15.75	15.53	15.67	15.40	15.73
Uppers.....	12.61	12.46	12.22	12.27	12.15	12.39	12.15	12.30
Brazilian (Fair) -								
Ceara.....	9.39	9.05	8.79	8.30	8.63	8.30	8.56	8.72
Sao Paulo.....	9.91	9.66	9.40	9.41	9.24	9.50	9.16	9.32
East Indian -								
Broach (Fully Good).....	7.96	8.03	7.69	7.66	7.51	7.74	7.45	7.52
C.P. Oomra No. 1, Superfine	8.41	8.34	7.94	7.91	8.23	7.99	7.69	7.76
Sind (Fully Good).....	7.27	7.30	6.90	7.09	6.94	7.08	6.79	6.86
Peruvian (Good) -								
Tanguis.....	13.69	13.44	13.16	13.17	12.76	13.04	12.47	-

Converted at current exchange rates.

UNITED STATES: Exports of cotton to principal foreign markets,
annual 1936-37 and 1937-38, and the seasons
August 1-September 15, 1937 and 1938 a/
(Running bales)

Country to which exported	Year ended July 31		August 1 - September 15	
	1936-37	1937-38	1937	1938
	1,000 bales	1,000 bales	1,000 bales	1,000 bales
United Kingdom.....	1,221	1,630	133	48
Continental Europe.....	2,594	3,047	338	248
Total Europe.....	3,815	4,677	471	296
Japan.....	1,593	728	33	100
Other countries.....	380	541	21	31
Total.....	5,788	5,946	525	427
Linters.....	277	270	33	28
Total excluding linters:	5,511	5,676	492	399

Compiled from the Weekly Stock and Movement Report, New York Cotton Exchange.

a/ Includes linters.

BUTTER: New Zealand grading, 1938-39 season to September 10,
with comparisons

Date	1935-36	1936-37	1937-38
<u>Week ended</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
August 1-June 25....	314,306	331,906	306,936
July 2.....	560	644	543
9.....	616	672	498
16.....	616	700	549
23.....	1,064	879	706
30.....	1,361	644	1,025
Monthly total.....	4,217	3,539	3,321
Total for season....	318,523	335,445	310,257
	1936-37	1937-38	1938-39
August 6.....	2,016	1,792	1,708
13.....	2,811	2,688	2,072
20.....	3,366	3,416	2,817
27.....	4,032	3,808	3,360
Monthly total.....	12,225	11,704	9,957
September 3.....	5,040	4,816	3,864
10.....	5,544	5,488	4,368
Total to Sept. 10...	22,809	22,008	18,189

Agricultural Attaché C. C. Taylor, London.

BUTTER: Australian grading, 1938-39 season to September 3,
with comparisons

Date	1936-37	1937-38	1938-39
<u>Week ended</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
July 9.....	502	811	2,197
16.....	506	896	1,649
23.....	598	900	1,420
30.....	764	793	1,602
Monthly total.....	2,370	3,400	6,868
August 6.....	943	1,310	2,283
13.....	1,942	1,102	1,519
20.....	1,516	1,107	1,837
27.....	2,027	1,418	2,551
Monthly total.....	6,428	4,937	8,190
September 3.....	2,612	1,695	2,345
Total to September 3	11,410	10,630	17,403

Weekly Dairy Produce Notes, Imperial Economic Committee, London.

BUTTER: Price per pound in New York, San Francisco, Copenhagen, and London, September 15, 1938, with comparisons

Market and description	September 16, 1937	September 8, 1938	September 15, 1938
	Cents	Cents	Cents
New York, 92 score	35.2	26.2	26.2
San Francisco, 92 score.....	36.5	26.5	26.5
Copenhagen, official quotation	24.6	23.8	23.6
London:			
Danish	30.0	29.2	29.0
New Zealand	25.9	26.6	25.7
Netherland	25.8	24.3	24.2

Foreign prices converted at current rates of exchange.

LIVESTOCK AND MEAT: Price per 100 pounds in specified European markets, September 14, 1938, with comparisons a/

Market and item	Week ended		
	September 15, 1937	September 7, 1938	September 14, 1938
	Dollars	Dollars	Dollars
Germany:			
Price of hogs, Berlin.....	18.06	17.96	17.96
Price of lard, tcs., Hamburg	11.85	9.47	9.49
United Kingdom: b/			
Price at Liverpool, first quality -			
American green bellies....	Nominal	14.55	14.47
Danish Wiltshire sides....	22.92	21.33	21.23
Canadian green sides.....	21.70	19.88	20.05
American short cut green hams	23.54	19.82	19.83
American refined lard.....	14.24	10.07	10.26

Liverpool quotations are on the basis of sales from importer to wholesaler.

a/ Converted at current rate of exchange.

b/ Week ended Friday.

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